

**Town of Arlington
Affordable Housing Trust Fund Board**

**REQUEST FOR PROPOSALS
Affordable Housing Trust Action Plan**

PROPOSALS DUE:

Thursday, June 2, 2022, 2:00 pm
Late Proposals Will Be Rejected

EMAIL COMPLETED SUBMISSIONS TO:

Kelly Lynema, Assistant Director
Department of Planning and Community Development
Town of Arlington,
781-316-3096
klynema@town.arlington.ma.us

**TOWN OF ARLINGTON, PURCHASING DEPARTMENT
730 MASSACHUSETTS AVENUE, ARLINGTON, MA 02476
REQUEST FOR PROPOSALS**

Affordable Housing Trust Action Plan

I. INTRODUCTION

The Town of Arlington, acting through its Department of Planning and Community Development (hereinafter referred to as DPCD) and the Arlington Affordable Housing Trust Fund Board (Trust), seeks proposals from consultants to develop an Affordable Housing Action Plan. Specifically, DPCD and the Trust seek the professional services from experienced planning, housing, and housing finance professionals qualified to develop a five-year framework to guide the activities of the Trust based on current and anticipated funding. The consultant shall assist the Trust in evaluating, refining, and confirming its goals and priority strategies, provide substantive support for the public engagement process being carried out by the Trust, developing an operating and funding framework, synthesizing materials into a draft plan, and assisting in the adoption and approval of the Action Plan.

This effort is funded through the Arlington Community Development Block Grant Program and the Affordable Housing Trust, for a total project budget of \$25,000. The Trust seeks to complete the Action Plan by October, 2022.

All questions regarding this Request for Proposals must be received by the Town no later than 4:00PM on Thursday, May 26, 2022, and addressed to the attention of Kelly Lynema, Assistant Director, Town of Arlington, and may be e-mailed to klynema@town.arlington.ma.us. If emailed, the subject line must state "RFP Questions – Action Plan".

Proposals are invited and will be received via email to klynema@town.arlington.ma.us on or before 2:00 PM on June 2, 2022. Proposals delivered after the appointed time and date will not be considered.

II. BACKGROUND INFORMATION

The Affordable Housing Trust Fund Board of Trustees (Board of Trustees) was established for the purpose of creating a separate fund "to provide for the preservation and creation of Community Housing in the Town of Arlington, as such term is defined in Section 2 of M.G.L. c.44B, the Community Preservation Act (CPA)."

The Board of Trustees acts on the powers set forth in M.G.L. Chapter 44, Section 55C. The eight-member Board includes one ex officio non-voting member, one member of the Select Board, at least one tenant who earns a low- or moderate-income and residents in subsidized housing and understands tenant issues, and at least two representatives of local housing organizations dedicated to the creation and maintenance of affordable housing. All voting members are residents or representatives of local housing organizations, and have experience in areas of expertise applicable to advancing the purpose and goals of the trust, such as real estate, social services, banking, law, etc.

The Trustees began their initial work in the fall of 2021 by drafting, receiving Select Board approval

for, and executing a Declaration of Trust. The Declaration of Trust will be recorded with the Middlesex South Registry of Deeds and filed with the Middlesex South Registry District of the Land Court as the Trust begins investing in projects.

In January 2022 and April 2022, the Arlington Redevelopment Board and the Arlington Select Board respectively voted to adopt the Arlington Housing Plan, which serves as an update to the Town's 2016 Housing Production Plan. In July 2021, the Town completed and filed a Fair Housing Action Plan. Both plans provide supporting data that demonstrate the need for affordable housing production in Arlington while laying out goals and strategies by which that need can be met.

With the Declaration of Trust in place and the adoption of the Housing Plan, the Trust has embarked on the development of a five-year Action Plan to guide future actions of the Trust. The purpose of the action plan is threefold: first, to create a transparent and clear plan for use by the Trust to communicate its work, goals, and priority initiatives to the community; second, to identify one or more areas of focus for the Trust based on available and anticipated resources combined with community-informed goals for the production and preservation of affordable housing; and third, to ensure that Trust resources are used to further the Town's goals and objectives in addressing local housing needs and related community goals. The Trust has established preliminary goals and strategies based on the Housing Plan and Fair Housing Plan. It has also established a community engagement process, which Trustees will implement concurrently with the development of the Action Plan. The Trust is seeking a qualified housing planner or housing finance consultant to determine the feasibility of the Trust's goals and objectives, integrate information gathered through the community engagement process into the Action Plan, and lay out a financial and operation framework to guide the work of the Trust over the next five years.

III. SCOPE OF SERVICES

The Arlington Affordable Housing Trust Fund (the "Trust" or "AHTF") seeks a consultant in connection with the development and preparation of the Trust's initial Action Plan for its first five years of operation, setting forth the goals, priorities, and initiatives that the Trust will pursue to advance its purpose of preserving and creating low- and moderate-income housing.

1. Evaluate, Refine, and Confirm Goals and Priority Strategies.

The Trustees have preliminarily identified goals and priorities for purposes of the Action Plan, drawing on the updated Housing Production Plan currently under review, the 2016 Housing Production Plan, the Fair Housing Action Plan, and proposals from the Trustees and other housing stakeholders. The preliminary goals and strategies will be used to solicit input from the community and the consultant regarding the goals and strategies to be considered for inclusion in the Action Plan. With respect to each potential goal or strategy, the consultant shall provide a preliminary assessment of options for advancing it, including an assessment of the feasibility, budget, implementation method, likely impact, and whether the strategies need to be adjusted to comport with the Trust's operation and funding. The consultant will also conduct research and provide recommendations regarding additional strategies.

While the Action Plan will be a long-term plan and will be prepared with substantial public participation, in light of the economic effects of the ongoing pandemic on low- and moderate-income persons, the worsening affordable housing crisis and the availability of time-constrained

federal resources to address the impacts of the pandemic, the Consultant shall assist the Trustees to identify opportunities for immediate action that the Trust might consider advancing in the short-term.

2. **Substantive Support for Public Engagement, Collaboration with Town Bodies & Housing Organizations.** The Trust is leading a public engagement process that includes stakeholder interviews, listening sessions, surveys, interviews and other public forums. The consultant shall provide substantive support for the community engagement and outreach process to be facilitated by Trustees during the process of reviewing and considering the Action Plan, in the interest of building Town-wide commitment to a proactive affordable housing strategy. This role will also include support for convening of housing-focused organizations with the same goal.
3. **Development of Operating and Funding Framework.** The consultant shall develop work with the Trust to establish an operating approach and operating strategies based on the Trust's goals, priority strategies, and information gathered through public engagement. This will include an evaluation of current funding sources, and consultant recommendations for additional revenue sources that the Trust should pursue to meet its five-year goals. The consultant shall work with Trustees to establish a **five-year budget** for the Trust, with scenarios based on funding availability and/or prioritization of strategies based on current and potential funding. The consultant shall prepare a **companion guide** which provides an overview and explanation of eligible uses of Trust funds and legal considerations, to serve both current and future Trustees. Finally, the consultant shall identify a framework for the Trust's operating approach.
4. **Preparation of Action Plan.** During and following the engagement process, the consultant will work with the Trustees to prepare a draft **Action Plan** for review and discussion by the Trust. The Consultant shall modify such draft plan pursuant to feedback from the Trustees and other stakeholders until such time as the Action Plan is approved by the Trust for presentation to the Select Board and other Town bodies for review and approval.
5. **Adoption and Approval of Action Plan.** The Consultant will support the AHTF as it presents the proposed Action Plan to other Town stakeholders and shall conduct further research and analysis as requested and modify the Action Plan further pursuant to such process if directed to so by the Trust.

The foregoing services and the ultimate Action Plan shall comply in all respects with the Municipal Affordable Housing Trust Fund Law (MGL c.44 §55C), title II, Article 14 of the Town Bylaw (Affordable Housing Trust Fund & Board of Trustees, ART. 8, STM 11/18/2020) and all other applicable laws and regulations.

The Consultant will work directly with the officers of the Trust or other Trustees authorized to direct the Consultant's work, and with the staff of the Town of Arlington Department of Planning and Community Development. The Consultant shall prepare such reports, presentations, data, and materials as the Trust shall reasonably require to support the outreach, engagement and approval processes included in this Scope of Work.

IV. **PROJECT SCHEDULE**

The Trust has already begun work on the Action Plan by developing a community engagement process and identifying the Trust's goals and priority strategies. Following on this work, the Trust has established an ambitious proposed timeline for completing the Action Plan, anticipating a

collaborative process between the public engagement being carried out by the Trust and the development of the Action Plan by the consultant. The following diagram describes the anticipated process for completion of the Action Plan.



The following diagram provides a more detailed timeline for the planning process that the Consultant will be expected to support.



The specific process and timeline may be adjusted as necessary, and the Consultant should expect to adapt accordingly to the maximum extent reasonable, within the overall general timeframe, as it is critical that the Trust be in a position to move forward with one or more strategies within the proposed timeline. We acknowledge that the work will be proceeding during the summer months, which cannot be avoided. The consultant is asked to describe in its response any vacation plans that will make the consultant unavailable during this anticipated time period.

V. DELIVERABLES

The consultant shall deliver eight (8) copies of all reports or work products produced, along with high-quality electronic copies of the same in an editable (Microsoft Word or Adobe InDesign format) and a searchable PDF version that is ADA compliant. Any data collected in support of the plan shall be provided to DPCD and the Trust, including background data for charts and graphics. All materials will become the property of the Town of Arlington.

VI. CONSULTANT QUALIFICATIONS

At a minimum, the proposing firm/team must meet the following requirements:

1. The firm/project manager/team must have at least five (5) years of experience in one of the following practice areas: affordable housing development, financing, housing planning, or a related field/
2. The firm/team must have previous experience in similar projects. Successful completion of a minimum of three (3) similar projects within the last five (5) years is required, and completion of five (5) overall is desired. For purposes of this provision, similar projects may be relevant to particular anticipated housing strategies, and need not be strategy or planning engagements with a Trust or other government body as client.
3. The principal and, if different, project manager to be assigned to this project must be available for meetings with the Town on days or evenings, as required.
4. The firm/team must have proven experience in the public and/or private sector and in working with public entities, such as (but not limited to) state funding agencies, municipal planning and community development departments, permitting authorities, housing authorities and affordable housing trusts, as well as experience working with private entities anticipated to be needed to execute Trust strategies, such as affordable housing developers, contractors, architects and engineers, home purchasers, lenders and investors.
5. The volume of the proposed project managers and firm's current and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner, including consistent progress during the summer months. The firm and all team members must be capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFP.

VII. SELECTION CRITERIA

The Town will award the contract to the Consultant offering the most advantageous response to this RFP, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria identified below. Finalists may be required to participate in an interview.

1. Minimum Evaluation Criteria

The Selection Working Group shall first review each technical proposal to ascertain whether or not the following minimum criteria have been met:

- a. The technical proposal includes all of the items for a complete proposal.
- b. The proposer meets the minimum qualifications as outlined above.

2. Comparative Evaluation Criteria

All responsive proposals will be judged against the Comparative Evaluation Criteria detailed below. The Town will rank each proposal as:

- a. Highly Advantageous – the proposal fully meets and significantly exceeds the standards of the specific criterion;
- b. Advantageous – the proposal fully satisfies the standards of the specific criterion;
- c. Not Advantageous – the proposal does not fully meet the standards of the specific criterion, is incomplete, unclear, or both.

The Selection Working Group shall rate and rank each technical proposal meeting the Minimum Evaluation Criteria according to the Comparative Evaluation Criteria listed below. The Fee Proposal Forms will then be opened and reviewed. The Selection Committee will then select the most overall advantageous proposal. Such ratings shall be included in a written recommendation for selection to the MHC.

2.1. **Quality and Depth of Project Experience**

- **Highly Advantageous** – The project proposal demonstrates superior experience in providing services related to the Town’s requirements. The project proposal demonstrates a wide depth of experience with similar projects (5 or more), and prior experience with municipally, privately, or grant-funded not-to-exceed or fixed-fee contracts. Project work samples are of outstanding quality in content and technical presentation.
- **Advantageous** – The project proposal demonstrates solid experience in providing services related to the Town’s requirements. The project proposal demonstrates a good depth of experience with similar projects (3 to 5), and prior experience with municipally or privately funded not-to-exceed or fixed-fee contracts. Project work samples are of good quality in content and technical presentation.
- **Not Advantageous** – The proposer has limited experience in providing services related to the Town’s requirements or with similar projects (less than 3), and prior experience with public or private, not-to-exceed or fixed fee contracts. Project work samples minimally meet current standards for content and technical presentation.

2.2. **Qualifications of the Proposer**

- **Highly Advantageous** – The proposer’s resume(s) demonstrate that proposer has superior training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience well beyond the minimum requirements.
- **Advantageous** – The proposer’s resume(s) demonstrate that proposer has adequate training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience that meets or somewhat exceeds the minimum requirements.
- **Not Advantageous** – The proposer’s resume(s) do not demonstrate that proposer has

adequate training, educational background and work experience appropriate to the project described herein.

2.3. Desirability of approach to the project, demonstrated understanding of the community's and region's affordable housing needs, and proposer's ability to undertake and complete this project in a timely manner.

- **Highly Advantageous** – The proposal demonstrates a superior approach to the subject material, an understanding of the affordable housing and cultural resource issues addressed by the project, and a clear analysis of the time required for each phase of the project. The proposal demonstrates a strong understanding of the community and region's history and present challenges around the creation and preservation of affordable housing.
- **Advantageous** – The proposal demonstrates a good approach to the subject material; an understanding of the affordable housing issues addressed by the project and presents a time schedule that meets the project requirements.
- **Not Advantageous** – The proposal does not demonstrate a desirable approach to the project and does not demonstrate a clear understanding of the affordable housing issues or needs in the community or region.

2.4 Strength and credibility of client references. The Consultant shall demonstrate prior client satisfaction with working relationship, project management capabilities, meeting project budget and schedule, and technical expertise in developing similar projects.

- ***Highly Advantageous*** – All references contacted spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.
- ***Advantageous*** – The great majority of references spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.
- ***Not Advantageous*** – One reference stated that there had been significant difficulties with the proposer's ability to deliver the contracted services and deliverables.

2.5. Completeness and Quality of Proposal

- ***Highly Advantageous*** – Response is complete, concise, informative, and highly detailed. Proposal reflects that proposer is able to perform in a superior manner acceptable to the Town. Evaluation team is completely convinced about the proposer's ability to provide the level of services as required by the Town. Proposal demonstrates excellent communication and documentation skills.
- ***Advantageous*** – Response is complete, informative, and meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer is able to perform in an adequate manner acceptable to the Town. Proposal demonstrates a good level of communication and documentation skills.
- ***Not Advantageous*** – Response lacks a comprehensive approach but meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer may be able to perform in a manner acceptable to the Town. Communication and documentation skills appear only adequate.

VIII. SUBMITTAL REQUIREMENTS

Interested qualified firms must submit a response addressing the objectives, scope and schedule described in this RFP. Responses must include, at a minimum, each of the following:

- One digital copy of the technical proposal in searchable PDF format shall be submitted.

1. General description of the firm/team's experience.
 2. Description, with examples, of the firm/team's experience in working with municipalities to successfully create Affordable Housing Action Plans and/or financing strategies.
 3. A detailed scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and objectives of the project, and methodology for accomplishing the tasks as listed in this RFP.
 4. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services, including anticipated summer vacation plans as requested above.
 5. Description of or resumes for the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumes of all personnel to be associated with the project.
 6. At least three (3) references, including name, title, agency, address, description of project, project cost, and telephone number and the email address for clients with similar projects completed by the Consultant within the last five years (including dates).
 7. Other pertinent information about the firm(s) that would aid the Town in making a selection.
 8. Completed Required Forms.
 9. Evidence of insurance coverage, including general and professional liability and Workers' Compensation insurance.
- One separate digital copy of the price proposal.
 1. Completed Price Proposal Form (attached)
 2. Estimated breakdown by task of professional service fees (including expenses), assigned project staff and hourly billing rates of all staff assigned to provide services (including any sub-consultants).

Proposals must clearly address all the submittal requirements; that is, the response should include a section addressing all the minimum qualifications, the minimum submittal requirements, and each of the review criteria. The proposal will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

A Selection Working Group may be convened to review proposals, with members drawn from Town staff and the Trust.

Responses to the RFP are due via email by 2 PM on June 2, 2022. All responses should be submitted to:

Kelly Lynema, Assistant Director, Department of Planning and Community Development
Town of Arlington
klynema@town.arlington.ma.us

The Town reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any RFP, and to accept or reject any item or combination of items. The Town also reserves the right to seek additional information and revised proposals prior to selection of a Consultant through written notice to all the respondents.

IX. INTERVIEWS

After review of the technical proposals, the Selection Working Group may, at its discretion, schedule interviews with any or all of the proposers for the purpose of further evaluation of the proposer's qualifications and ability to provide the required service. Interviewees will be ranked on their presentation.

X. PROJECT FUNDING

Consultants must complete the attached Price Proposal Form under separate cover. Project fees must be provided for each Project Component of work as described in the Scope of Services. Fees shown will include all costs and expenses (copying, mileage, photographs, maps, etc.) to complete the Scope of Services defined in this RFP. Also, the selected Consultant will be required to submit invoices identifying hours, expenses, and total cost by specific tasks. The final contract scope, price and fee will be negotiated with the highest ranked responder.

XI. REQUIRED FORMS

All required forms must be submitted with the proposal.

- A. Certificate of Non-Collusion
- B. Certificate of Tax Compliance
- C. Price Proposal Form

**CERTIFICATE OF NON-COLLUSION FORM
TOWN OF ARLINGTON
AFFORDABLE HOUSING TRUST ACTION PLAN**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of Individual Submitting Bid or Proposal

Name of Individual Submitting Bid or Proposal

Name of Business

Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**CERTIFICATE OF TAX COMPLIANCE FORM
TOWN OF ARLINGTON
AFFORDABLE HOUSING TRUST ACTION PLAN**

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security Number or
Federal Identification Number

Signature and Title of Individual or
Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**PRICE PROPOSAL FORM
TOWN OF ARLINGTON
AFFORDABLE HOUSING TRUST ACTION PLAN
Arlington, MA 02476**

CONTRACTOR Town Manager
Town of Arlington
730 Massachusetts Avenue
Arlington, MA 02476

PROPOSER

PROJECT: Consultant Services for Affordable Housing Action Plan

Proposed Price (in words): _____

Proposed Price (in numbers): \$_____

Please attach estimated budget and breakdown by planning element of professional service fees, assigned project staff and hourly billing rates of staff.

Signed

Title

Print Name

Date Signed